



**ADVERTISEMENT FOR PROPOSALS
FOR
INTEGRATED LIBRARY SYSTEM (ILS) FOR
THE CITY OF GRAND ISLAND PUBLIC LIBRARY
1124 WEST 2ND STREET
GRAND ISLAND, NEBRASKA, 68801**

Proposals will be received by the **City Clerk, 100 East First Street, Grand Island, NE 68801** or **PO Box 1968, Grand Island, NE 68802-1968** until **4:00 P.M.** (local time) on **April 13, 2021**, for is for the solicitation of qualified firms to provide an Integrated Library System (ILS) for the Grand Island Public Library (GIPL), a department of the City of Grand Island, Nebraska. Proposals received after the specified time will be returned unopened to sender. Proposals must be based on the City's Request for Proposals. Appointments for site inspections or to answer any questions on the RFP can be arranged by contacting Grand Island Public Library, Shaun Klee, Technical Services Librarian, at shaunk@gilibrary.org OR (308)-385-5333 ext.106.

The specifications and addenda may be viewed online at www.grand-island.com under Business-Bid Calendar. Documents for use in preparing the Proposal may be downloaded from the Quest CDN website, www.QuestCDN.com for a thirty-dollar (\$30) fee.

Proposals shall be marked "**PROPOSAL FOR INTEGRATED LIBRARY SYSTEM (ILS).**" All Proposals must be signed and dated in order to be accepted. One original and two complete copies shall be submitted for evaluation purposes. If Proposals are being submitted online via QuestCDN, the submitter is **NOT** required to submit hard copies. Proposals not containing the correct number of copies will not be considered.

The successful Proposal will be required to comply with fair labor standards as required by Nebraska R.R.S. 73-102 and comply with Nebraska R.R.S 48-65y pertaining to contributions to the Unemployment Compensation Fund of the State of Nebraska. Successful Proposers shall maintain a drug free workplace policy. Every public contractor and his, her or its subcontractors who are awarded a contract by the City for the physical performance of services within the State of Nebraska shall register with and use a federal immigration verification system to determine the work eligibility status of new employees physically performing services within the State of Nebraska.

Proposals will be evaluated based upon firm's compliance with the RFP, previous experience with Grand Island Public Library and cost. Proposals shall remain firm for a period of ninety (90) days after Proposal due date. The City Of Grand Island reserves the right to refuse any or all Proposals, to waive technicalities, and to accept whichever Proposal may be in the best interest of the City, at its sole discretion.

RaNae Edwards, City Clerk

**GRAND ISLAND PUBLIC LIBRARY
REQUESTS FOR PROPOSALS
FOR INTEGRATED LIBRARY SYSTEM (ILS)
CITY OF GRAND ISLAND, NEBRASKA**

PURPOSE

This Request for Proposals (RFP) is for the solicitation of qualified firms to provide an Integrated Library System (ILS) for the Grand Island Public Library (GIPL), a department of the City of Grand Island, Nebraska.

PROJECT BACKGROUND AND SCOPE

The Grand Island Public Library currently belongs to the Nebraska Pioneer consortium of 22 public and community college libraries that share the PTFS Biblioovation (formerly KOHA) ILS. GIPL has been on the PTFS system since 2011. Due to growth and changing services of the Grand Island Public Library and an extensive review of the current system, GIPL is seeking RFPs for replacement of our current ILS. This proposal would be for an ILS to serve only Grand Island Public Library and its patrons individually, not the entire Pioneer Consortium.

GIPL is looking for a respondent who can complete the entire process of ILS migration, service, and ongoing support for the GIPL ILS. Bids should at least include:

- Your responses to the determined technical requirements for our ILS as outlined in Appendix A
 - Statistical data including number of registered patrons, number of holdings, etc. are listed in the appendix
- Pricing for migration and ongoing use of the ILS, preferably over five years or longer
- Estimated time-frame for completion of migration, training, and go-live for the ILS system
- Other relevant information for consideration

PROJECT INFORMATION

Questions regarding the RFP should be directed to Shaun Klee, Adult & Technical Services Librarian: shaunk@gilibrary.org OR 308-385-5333 ext. 106.

SELECTION PROCESS

Submittals will be evaluated with the following considerations to evaluate the proposals:

- Compliance with the RFP
- Previous experience with GIPL
- Cost

This RFP does not commit the City to award a contract or agreement, to pay any cost incurred in the preparation of a submittal responding to this request, or to contract for services. The City reserves the right to accept or reject any or all submittals received, to negotiate with qualified sources, or to cancel the request in total or in part. The City may require the selected respondent to submit such data or other information necessary to substantiate costs, or to revise technical, schedule or other elements of their submittals in accordance with contract negotiations.

CONTENT OF PROPOSAL

Submittals should be as concise as possible, and should contain as a minimum the information presented below. Submittals for partial categories of work will not be accepted. Additional materials, including detailed resumes and brochures may be submitted as an attachment to the submittal. Brochures and marketing materials not directly related to specific experience with the proposed scope of work shall not be submitted.

Proposal package shall include the following:

Introductory Letter:

- A one page introductory letter, addressed to the Library, which contains the respondent's mailing address, telephone number, fax number, and the name of the person to contact regarding the qualifications. The letter should also state an expression of the respondent's interest in the work.

Statement(s) of Qualifications:

- Respondent's qualifications and experience in the recent past with similar work to that of the work category of interest. Respondent should demonstrate full capability in providing the required services.
- Identification and role of key personnel proposed to participate in the services provided, along with their background and experience. Be specific in identifying the nature and the extent of each person's participation.

Project Schedule and approach:

- Respondent to provide an approach and proposed implementation schedule.
- A sample agreement that includes a listing of all services available as a result of the proposal
- Cost and Fee Proposal, including full disclosure of all fees and verification that all services provided therein are included in the final proposal cost.

References:

- Attach a separate sheet containing a minimum of three (3) references for whom the respondent has provided similar work during the previous five (5) years.

FINAL SELECTION IS SUBJECT TO REVIEW AND APPROVAL BY THE GRAND ISLAND CITY COUNCIL AND IS CONTINGENT UPON NEGOTIATING A SATISFACTORY AGREEMENT.

SUBMISSION DEADLINE

Respondents to this RFP must deliver three (3) copies of their proposal to:

City of Grand Island
ATTN: City Clerk
City Hall, 100 East First Street
P.O. Box 1968
Grand Island, NE 68808-1968

Submittals should be marked "**Grand Island Public Library ILS Replacement**" and shall be delivered to the Office of the City Clerk no later **than 4:00 p.m. (CST) on April 13, 2021**

OR

Documents for use in preparing submittals may be downloaded from the Quest CDN website, www.QuestCDN.com for a \$30 fee. Submittals must either be uploaded to the Quest CDN website or received in hard copy before the specified time to be considered.

Contact RaNae Edwards, City Clerk, for further information.

The statements of qualification and any addenda may be viewed on-line at www.grand-island.com under Business – Bid Calendar.

Submittals shall include, but are not limited to:

- **Introductory Letter**
- **Statement of Qualifications**
- **Project Schedule and Approach**
- **References**
- **Miscellaneous (any exceptions to the submittal requirements)**

Documents provided shall remain firm for a period of ninety (90) days after the submittal due date. Submittals received after the designated time will not be considered in the selection process and will be retained unopened until after award. The City reserves the right to accept or reject any or all submittals and to waive informalities or irregularities in the selection process.

ETHICAL BIDDING PRACTICES

By submitting a proposal to the City of Grand Island, you agree that discussion of your bid with individuals who work for the City (employed or elected) shall be limited to the individual named as the contact for the proposal, the evaluation committee for the proposal and the City of Grand Island Legal department. Any attempt to influence the selection process beyond what is requested by the named contact, or their designee, will result in your bid being disqualified from further consideration.

GRATUITIES AND KICKBACKS

City Code states that it is unethical for any person to offer, give or agree to give any City employee or former City employee, or for any City employee or former City employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefore. It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a consultant under a contract to the prime consultant or higher tier consultant or any person associated therewith, as an inducement for the award of an agreement or order.

FAIR EMPLOYMENT PRACTICES

Each proposer agrees that they will not discriminate against any employee or applicant for employment because of age, race, color, religious creed, ancestry, handicap, sex or political affiliation.

LB 403

Every public contractor and his, her or its subcontractors who are awarded a contract by the City for the physical performance of services within the State of Nebraska shall register with and use a federal

immigration verification system to determine the work eligibility status of new employees physically performing services within the State of Nebraska.

FISCAL YEARS

The City of Grand Island, Nebraska operates on a fiscal year beginning October 1st and ending on the following September 30th. It is understood and agreed that any portion of this agreement which will be performed in a future fiscal year is contingent upon the City Council adopting budget statements and appropriations sufficient to fund such performance.

TERMS AND CONDITIONS

The City will not pay any costs incurred by the firm in preparing or submitting the requested documents. The City reserves the right to modify or cancel, in part or in its entirety, this RFQ. The City reserves the right to reject any or all submittals, to waive defects or informalities, and to offer to contract with any firm in response to any RFQ. This RFQ does not constitute any form of offer to contract.

TITLE VI

The City of Grand Island, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office the Secretary, Part 21, Nondiscrimination in Federally assisted programs of the Department of Transportation issued pursuant to such Act, hereby notified all bidden that it will affirmatively insure that in any contact entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin, sex, age and disability/handicap in consideration for an award.

SECTION 504/ADA NOTICE TO THE PUBLIC

The City of Grand Island does not discriminate on the basis of disability in admission of its programs, services, or activities, in access to them, in treatment of individuals with disabilities, or in any aspect of their operations. The City of Grand Island also does not discriminate on the basis of disability in its hiring or employment practices.

This notice is provided as required by Title II of the Americans with Disabilities Act of 1990 and Section 504 of the Rehabilitation Act of 1973. Questions, complaints, or requests for additional information or accommodation regarding the ADA and Section 504 may be forwarded to the designated ADA and Section 504 compliance coordinator.

End of Request for Proposals Information

GRAND ISLAND PUBLIC LIBRARY INTEGRATED LIBRARY SYSTEM (ILS) REPLACEMENT

Appendix A

Background

The Grand Island Public Library (GIPL) currently belongs to the Nebraska Pioneer Consortium, a statewide consortium of 22 public and community college libraries that share the PTFS Bibliovation (formerly KOHA) Integrated Library System. GIPL has been on the PTFS system since 2011. GIPL is inviting Requests for Proposals for replacement of our current ILS. This proposal would be for an ILS to serve only the Grand Island Public Library and its patrons individually, not the entire Pioneer Consortium.

Please review the following library statistical data and technical requirements and address, *as concisely as possible*, how you (the “Vendor”) meet the requirements.

Library Overview/Statistics

As of March 22, 2021, Grand Island Public Library has the following statistical data available:

- 36,331 patron records
- 124,710 physical items held on 104,977 bibliographic records
- 138,357 Annual physical circulations

The most recent complete statistical data for GIPL can be found on the Nebraska Library Commission Statistical Data webpage [https:// http://nlc.nebraska.gov/stats/](https://nlc.nebraska.gov/stats/).

Technical Requirements

After extensive review, GIPL has identified the following requirements necessary for our integrated library system. Please identify how your ILS meets the requirements. If your system does not meet a requirement or partially meets a requirement, identify future plans to address unmet functions.

System Architecture & Design

- The ILS must be available in both hosted and onsite installation options.
 - GIPL preference is for hosted/cloud availability offered by vendor, without the need for GIPL to manage or maintain servers
 - Cloud/hosted services must offer all of the following:
 - HTTPS security in all modules of the ILS
 - Data at rest encryption
 - Geographically diverse, redundant database servers
- The ILS must include the licensing for any or all relational database management system (RDBMS) licensing in the software costs. GIPL preference is for an embedded license of Oracle RDBMS or similar
- All staff interfaces **must be web-based**
 - For the purpose of this RFP, terminal services, remote desktop connections, and/or Citrix applications are **not** considered web-based
- Staff interface start page or portal must be customizable. This includes:
 - Configurable links and announcements
- Ability to integrate with peripheral equipment such as barcode scanners (both wired and wireless), receipt printers, RFID readers, etc.

Vendor Application Programming Interfaces (APIs)

The Vendor must create, supply, and maintain APIs for the following digital services offered and utilized by GIPL:

- Patron authentication
- Digital Content Integration
- Ad hoc reporting functions
- Illion i-Tiva (Talking Tech)
- SIP/SIP 2.0+ servers
- NoveList
- Goodreads
- EBSCOHost
- EZProxy
- RSS indexing
- Overdrive
- Hoopla
- Comprise Computer Management

Public Access Catalog (PAC)

- The PAC must be easy and intuitive for both new and experienced library users
- PAC must offer persistent search box which is always present and easily located
- The PAC must consume and display Resource, Description and Access (RDA) MARC indexing and fields
- PAC must be Unicode compliant
- PAC must allow staff to customize welcome and other messages and images. Additional charges must be specified.
- PAC must allow staff to create reading lists and/or featured items by either saved searches or staff curation
- PAC must allow easy creation of lists of newly published or cataloged items, by multiple date ranges.
- PAC must support ability to create different landing pages or configurations based on library defined “zones” within the library building (for example reference, children’s, etc.).
 - This service must be offered at no additional charge
- PAC system **must** include a Responsively Designed mobile interface
 - Display must be automatic on mobile devices or a mobile app
 - PAC should be touch screen and tablet optimized
 - PAC must scale automatically to effectively utilize the available resolution of the device on which it is being viewed
 - This service must be offered at no additional charge
- The PAC system must accurately display cover art such as book jackets, CD/DVD cover art, etc.
 - PAC must also allow for use of local images for cover art for items that do not have commercial content, local items, historical items, equipment, etc.
- PAC offers enhanced content with the following features:
 - Suggestions/”You may like”

- Including suggested similar series or authors
 - Series information, including other books/items in series
 - Author information
 - Summaries
 - Professionally sourced reviews
 - Award information
 - Lexile and Accelerated Reading (AR) data for children’s materials
 - Lexile and AR data must be sourced automatically from vendor-supplied sources rather than staff manually entering data into MARC records
 - Lexile and AR data must be supplied at no additional cost
- PAC must include content integration with
 - NoveList and NoveList Plus
 - Goodreads
- Fields displayed on Title Details screen can be selected and arranged by the Library
- Faceted limiting must be supported and allow administrators to configure and/or hide unwanted filters
- Patrons can download eResources (such as Overdrive items) from multiple vendors without having to leave the PAC site
- Patrons should be authenticated via SIP or EZProxy when API is not available
- PAC offers spell-check and search suggestions during searches
 - Spell-check and suggestions should come from the library database, not a generic dictionary, ensuring patrons receive results from suggestions
- PAC offers online user registration for new users
 - Library administrators shall be able to determine online registration requirements
 - Patrons registered online shall have immediate access to eResources, if allowed by Library
 - Patrons registered online can be identified as such, and assigned a temporary barcode number or other status in the system
 - Online registrations can be set to expire if registration process is not completed
- Patrons can save or share their online PAC searches
- Patrons can opt-in and view their reading history in the PAC
- Patrons can place holds at title- or item-level, depending upon Library hold policies
- Patrons can place holds in a batch from saved lists, if Library chooses to allow this
- Patrons can view their existing holds, and position in the holds queue for items
- Patrons can suspend and re-activate holds from within their PAC account
- Patrons can edit notification preferences from within their PAC account
- PAC offers patron the ability to create an easy username, rather than requiring a full card barcode number
- PAC is EBSCO Discovery Services (EDS) compliant

Children’s PAC Interface

The ILS must offer a children’s PAC interface with the following requirements:

- A completely separate PAC designed specifically for children and young readers
 - This does not include the standard PAC with a simplified design
- Children’s PAC includes both icon and text searching capabilities
- Children’s PAC includes multiple search category and icon sets
- Children’s PAC offers interactive, easy-to-scroll and browse results
- Children’s PAC offers a thumbnail jacket stream for faster navigation
- Children’s PAC offers fully-integrated Series Searching
- Ability for series to display in series or chronological order
- System must provide accurate series linking for easier series browsing
- Children’s PAC must include spelling help and corrections
- Item availability in Children’s PAC must be displayed in simplified manner, such as “IN” or “OUT” rather than terms such as “Available” or “On Loan”
- Item holds/request functions in Children’s PAC must also be displayed in a simplified manner, such as “I WANT THIS” rather than terms such as “Request for hold”
- Children’s PAC interface should include large cover display images
- Lexile, AR and other reading program data should display in the Title details screen

Cataloging and Authority Control

- Cataloging interface must be web-based (i.e., operates in web browser) not via an RDP connection or similar
- Cataloging must be responsively designed for a variety of screen sizes and resolutions
- Real-time Authority Control *processing* must be included
 - Any additional costs must be itemized
- Real-time and ongoing RDA processing/enhancement when records are saved
 - Any additional costs must be itemized
- Out-of-date authorized headings in bibliographic records will be updated to current Library of Congress (LC) headings and matching of authority records are to be supplied when the database is loaded
- RDA upgrading of existing MARC records must be included at the time of conversion
- The system must update all occurrences of a heading in a bibliographic file with a single global change transaction
- Vendor must perform authority control processing during implementation **and** continue support with real-time access to the National Authority Files as an ongoing process
 - Any additional costs must be itemized
- Authority Control Processing must include matching every subject heading, author entry, and uniform title in the current database against the National Authority Files, and update records accordingly during conversion
- When a record is saved, the system must **automatically** perform authority control verification based on the local authority file *and* automatically provide real-time access to national authority files if the records is not found in the local file
- The system must automatically update records globally with national authority control changes when necessary and then add the new record to the local authority file.
 - A batch process is not acceptable

- The system must automatically compare the local authority file against the national authority file and update changes automatically, manually, or a combination thereof
- Cataloging must offer real-time glossaries for authority information, awards, and genres
- The system must allow the ability to view bibliographic records in the MARC21 standard
- Cataloging module must be able to add and display RDA fields
- Cataloging interface must be Unicode compliant
- Book jacket or cover images should be displayed when working within the record
- Image, title, and author should remain at the top of the screen when editing a bibliographic record
- Standard keyboard shortcuts for cut, copy, paste must work in the cataloging module
- Web browser spell check functions should work in the cataloging module
- A shortcut to the PAC record must be available from within the cataloging module
- Record comparison and holdings moving must be done in an easy-to-use visual manner
- Cataloging must allow for multiple user access levels ranging from “View Only” to “Full access” and everything in-between
- Cataloging must allow ability to search Z39.50 datasets for MARC Records
 - This includes the ability to establish and use a Z39.50 connection directly to OCLC Connexion using GIPL OCLC credentials
- Cataloging module must allow users to save records in a draft state for later editing
- Ability to batch export MARC records
- Ability to batch import MARC records with data overlay capabilities on existing records
- GIPL preference is that Authority Control and Bibliographic data preparation be performed by the Vendor and not sub-contracted to a third party

Circulation Module

- Circulation module must be web-based. RDP or similar connections are not considered web-based
- Circulation module must be operable on a variety of devices including desktop/laptop computers, tablets, touch-screen, etc.
- Circulation must have configurable, multiple user access levels
- Users must be able to easily switch between tasks without losing data
- In the event a user makes an unsaved change, module must warn user that changes are not saved
- Circulation must display both the location and name of user that is logged in
- Circulation must display an easy-to-see and understand message counter, which notifies staff of new items on holds pull list, cancelled requests, etc.
- Circulation module should have shortcut keys to switch between popular/frequent tasks
- Circulation must offer a “Smart Search” option to lookup borrowers by multiple criteria:
 - Including name
 - Barcode/patron ID
 - Alternate ID

- Phone
- Address
- Birthdate
- E-mail address
- Check-in functions should include:
 - Standard check-in
 - In-house/statistical use (that is not linked to a patron)
 - Special status options (such as mending, damaged, etc.)
 - Ability to override check-in date
 - Ability to sort the check-in list by returning borrower, titles, etc.
 - Display actions alerts, if required, such as item on hold, lost item found, etc.
 - Ability to recall or reprint previous action alerts
 - Automatic, and accurate, handling of any fines
- Information on the patron summary screen links to appropriate account settings
- Checkout dates can be overridden by staff with appropriate permissions
- Users can customize checkout screen at each of their workstations to accommodate different workflows
- Items checked out to a patron can be worked with individually or in a batch
- Circulation enables the following actions on checked out items:
 - Renew
 - Renew all
 - Mark Lost
 - Mark “claims returned” (or similar)
 - Print receipts
 - Real-time fines to-date
- Checkout receipts/slips must be customizable
 - Ability to print OR email slips to patrons
- Patron accounts should support more than one email address
- Ability to text notices to patrons
 - Specify any additional charges for this, either for GIPL or patron
- Ability to email notices to patrons
 - Specify any additional charges for this, either for GIPL or patron
- Ability to print notices
 - Specify any additional charges for this, either for GIPL or patron
- Ability to integrate with telephony software (such as Illion i-Tiva/Talking Tech) for phone notices
- All notices and notice intervals are configurable by the Library
- System offers a courtesy or pre-due notice reminding patrons of upcoming due dates
- Staff are able to manage holds
 - Including cancelling, suspending, re-queuing,
 - Ability to place holds at/on
 - Title level (next available copy)
 - Item level
 - Multiple copies
 - Easily identify and remove cancelled or expired hold requests both on-shelf and from the ILS system itself

- All item codes, location codes, patron codes, and any other authorized value code are controllable by the Library without Vendor intervention to add new codes, change existing codes, or delete unused codes
- Staff can easily copy borrower records for setup of family accounts
 - Ability to link family members to each other's accounts
- Circulation rules allow for setting of account blocks for family members/linked accounts
- Ability to create check-in/checkout notes in the Circulation module, without having to enter Cataloging
- Ability for “on-the-fly” or “Fast-add” record creation

Inventory Control

- Inventory module must be included
- In addition to basic operation, the system must include a real-time inventory interface
 - i.e., no files to save, store, upload, download, or import/export
- Inventory module must be compatible with a tablet or portable device
- Shelf status must be checked when each item is scanned/inventory and immediately notify of any errors
- Module checks inventoried item status, if other than “checked-in” status inventory will check to see if item can be checked-in, and will automatically change the status
- Compatible with RFID

Reporting Module

- Vendor must provide customized, business intelligence consulting services
 - Identify any additional costs
- System must provide on-demand, ad-hoc reporting capability. Please describe
- Ad-hoc reporting must **not** require knowledge of the RDBMS structure language (SQL, Oracle, MySQL, etc.)
- Ad-hoc reports must be able to be saved and shared with authorized users
- Ad-hoc reporting data must provide lateral movement between modules
- Reporting must be web-based, accessible with any standard Internet browser
- Reports must be able to be scheduled to run
- Ability to print and email completed reports
- Ability to export completed reports in a variety of formats including PDF, HTML, XML, CSV, Excel

Acquisitions

- ILS must offer a collection development tool in addition to an acquisitions module
- Acquisitions must utilize MARC records
- Acquisitions must include automatic copy cataloging with batch overlay of order records by *full* MARC records from a hierarchy of library-defined sources
- Library should have the option to display items in the OPAC automatically when an order is released, transmitted, received, approved, or not at all
- Library should have the option to optionally change the default for when items display in the OPAC by individual items or lists

- The system must be compliant with Electronic Document Interchange (EDI) standards issued by ANSI X. 12 for invoicing and ordering
- Acquisitions must seamlessly interface with Z39.50 servers as well as major vendors, Brodart and Midwest Tapes, etc. so that vendor neutral “lists” or “carts” can be easily constructed
- The system must de-duplicate or prevent the duplication of records based on the local database, current acquisitions orders, and current selection lists
- The acquisitions module must inform users of local copy information such as pending holds, copies owned, lost or missing items, etc.
- Acquisitions must be able to place holds for patrons on items as they are ordered
- Acquisitions must support uploading of carts or lists from major vendors into the acquisitions tables
- It must be possible to barcode items during receiving
- Acquisitions must support combined invoicing and receiving
- Acquisitions must offer all aspects of fund management
 - Accurate calculation of all funds
 - Fund creation
 - Fund allocations
 - Fund permissions
 - View fund effects
 - Report on funds
 - Fund rollover

Training

- Online training tutorial module must be included
- Vendor must include a main syllabus/course listing screen
- System training must include live webinars both initially and ongoing
 - Identify any additional costs
- Tutorials must cover all core modules:
 - Circulation
 - Reports
 - Cataloging
- Each course must offer online videos, walking-through common functions and tasks
- Training must demonstrate and highlight functions both visually and by voice instructions
- Training must be separate, different from, and in addition to, standard help files in the system
- Must include systematic instructions on how to perform tasks
- Must be available to all authorized users